

The contracting process for Consultant Rotation List A&E contracts valued between \$25,000.00 and \$1,000,000.00 is as follows:

1. Project Manager (PM) requests the A&E Project Request Form from the Public Works Contracts (PWC) Consultant Services Coordinator (CSC). With the Project Request Form the CSC will email instructions regarding completion of the form. The PM will provide PWC with:
 - a. A completed A&E Project Request Form including a WBS or Internal Order number open to PWC,
 - b. The Scope of Services, and
 - c. Completed Human Resources (HR) Approval form with authorization signature from HR liaison.
2. Upon receipt of proper project intake documentation (see above), the CSC provides the names of five consultants from the City's Consultant Rotation List along with the Boiler Contract Number (H#####), standard correspondence and forms. (If two contracts will be awarded, nine consultants will be provided. When three or more contracts will be awarded, three additional firms are provided for each additional contract.) NOTE: Any single agreement that exceeds \$1,000,000.00 must be awarded utilizing the RFP process and cannot use the Rotation List.
3. At the same time, the CSC requests three (3) EOCP requirements from the five consultants and provides an appropriate deadline. Upon receipt of the EOCP requirements the CSC reviews the requirements. The CSC informs the PM of the results of the review. Only those firms that pass the minimum requirements will be able to interview for the contract.
4. The CSC forwards the responsive requirements to EOCP. EOCP has ten calendar days to provide the PM with scores for the consultant firms.
5. The PM mails invitation to firms and schedules interviews.
6. The PM prepares interview script and ranking summary sheets.
7. The PM notifies Selection Panel of impending interviews.
8. The PM chairs the interview process and compiles the scores for each consultant interviewed.
9. The PM summarizes and verifies the scores of each consultant.
10. The PM prepares memorandum for the director's approval immediately following finalization of scores.
11. Upon receipt of the initiating department director's approval, PM distributes Director's approval to the cc list on the memo, notifies all participants of the results of the interview process and the selected Consultant by calling each proposer on the telephone.
12. The PM, in accordance with the standard correspondence provided:
 - a. Mails notification to selected firm(s), and
 - b. Mails notification to non-selected firms.

13. Once the most highly qualified firm is identified and approved by the PM's director, the PM begins negotiations with the firm. If the PM is unable to finalize negotiations with the most qualified firm, the PM will terminate negotiations with the firm and begin negotiations with the next most highly qualified firm, and so on, until an agreement is reached.
14. The PM verifies with the CSC that the boiler Contract initially provided is still in effect. If a new boiler is necessary it will be provided at this time.
15. Once the PM finalizes negotiations, the PM adds their project specific information to the boiler and returns the Draft Contract to PWC for review in **Microsoft Word** format and must include the completion of all data fields in the boiler as well as:
 - a. Exhibit A – Scope of Services,
 - b. Exhibit B – Compensation Schedule, and
 - c. Exhibit C – Time Schedule (Not applicable to As-Needed contracts).

Only the boiler obtained from PWC shall be used. **The Consultant does not sign the Contract at this stage of the process but the PM should review any exhibits provided by the selected consultant for accuracy.** Incomplete Draft Contracts will be returned to the PM. After PWC reviews the Draft Contract, the project manager shall forward the draft to their department's Deputy City Attorney for review. Once this review process is complete, the project manager will transmit a PDF of the Final Contract to the consultant for signature for Mayoral (non-Council) actions only. See Note 2 of step 16 below for instructions for awarding via City Council Action (E-1472).

16. The PM may start the routing of their award document (Form E-PA 2625 or E-1544) at this time. At this time the PM should also update their Purchase Requisition to include the name of the selected Consultant and the Contract Number for the project. The Contract Number should be typed into the "Texts" field.

Note 1: Form E-PA 2625 (for CIP funded contracts) or Form E-1544 (for non CIP funded contracts) are generally used. However, for non CIP funded contracts, if the selected Consultant has been awarded more than \$250K in contracts or amendments in the current fiscal year (including the current award), City Council approval (via E-1472) will be required in order to award the contract. For CIP funded contracts the current fiscal year award threshold is \$1 million (including the current award) before an E-1472 is required for contract award. If your contract is partially or fully Operations & Maintenance (O&M) funded, please contact PWC for additional instructions.

Note 2: If you discover that an E-1472 is required to award your contract please STOP using this procedure summary and contact PWC to request the procedure for awarding a contract via an E-1472. DO NOT continue following the remainder of the steps below.

17. Once your OnBase action routes to external approvers, the following items are emailed to Cindy Crocker at ccrocker@sandiego.gov:
 - a. PDF copy of the Contract signed by the consultant that includes all applicable exhibits in the Contract filled out by consultant.
 - b. Completed Consultant Award Tracking Form (provided to you by PWC). The top portion is completed by you and the bottom portion is completed and signed by the consultant.

- c. The name of your assigned DCA.
- d. Confirmation the Consultant's insurance is compliant with Ebix (PWC will provide you instructions on this process at the time of our draft review).
- e. Consultant's signature authority document (PWC will provide you additional instructions on this item at the time of our draft review)

18. PWC reviews the action document in OnBase (PA 2625 or 1544), Comptroller's Certificate, Contracts, insurance and endorsements, signs the Contract, approves the action in OnBase, and then emails the package to the City Attorney's Office for final signature.

19. The City Attorney's Office reviews the Contract and insurance. If all is acceptable, the Attorney's Office signs the Contract, approves the action in OnBase, and emails the package back to PWC.

20. PWC issues a Notice to Proceed (NTP), and distributes a PDF copy to the Consultant, PM, & EOCP.

21. PWC assigns a SAP Outline Agreement number at this time. PM generates a Purchase Requisition (PR) for the Contract or each Task Order, as applicable, and PWC assigns a Purchase Order (PO) number.